



Completing a New Hire and Benefit Enrollment Overview

This business process is applicable to both Health Benefits Only (HBO) Agencies and localities in The Local Choice (TLC) Benefit Program.

This Job Aid provides a walkthrough of the steps a Locality HR and BA must complete to complete a new hire processing and the benefit enrollments on behalf of the employee and assumes the employee submits a benefit enrollment form to the BA with all the information necessary to complete the process.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

Ensure the job aid is followed carefully as entering incorrect or missing information in personal data fields will cause significant impact to downstream payroll and benefits processes. (i.e., Anthem, Aetna, and VRS)

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Adding a New Hire

Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

Navigator > Workforce Administration > Personal Information > Add a Person

The **Add a Person** page displays.

2. Click the **Search for Matching Persons** link.

The **Search/Match** search page displays.

3. Click the **Clear** button.



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The **Search/Match** search page refreshes.

Search/Match

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ **Search Criteria**

Search Type =

Search Parameter begins with

Ad Hoc Search ☐

Description begins with

Limit the number of results to (up to 300):

Search **Clear** [Basic Search](#) [Save Search Criteria](#)

4. Click the **Search** button.

The **Search/Match** page displays.

Search Criteria

Search Type Person ☐ Ad Hoc Search

Search Parameter PSRS_HIRE Prepare For Hire

Search Result Rule ?

Search Result Code PSRS_HIRE x Prepare For Hire

[User Default](#) **Search** **Clear All** **Carry ID reset**

Search Criteria ?

Search Fields

National Id

Search by Order Number ?

Search Order	Description
10	NID Only

Selective Search

5. Enter the employee's SSN into the **Value** field.
6. Press the **Tab** key on the keyboard to enable the **Search** button.
7. The SSN is reformatted automatically (i.e. dashes are removed if they were entered). Click the **Search** button.



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The **Search Results** page displays in a pop-up window.

The screenshot shows the 'Search Criteria' page. A red box highlights a pop-up message that reads: 'Search Criteria did not return any results (18160,43). Enter new or additional Search Criteria.' Below the message is an 'OK' button. The background page shows search criteria for 'Person' with 'PSRS_HIRE' as the search parameter. Other visible elements include 'Ad Hoc Search' checkbox, 'Prepare For Hire' button, 'Search Result Rule' section with 'PSRS_HIRE' as the search result code, and a 'Search by Order Number' section with a table showing '10' and 'NID Only'.

Note: The message depicted above displays when the employee's SSN is not already in the Cardinal system. Release 1 localities need to provision an employee ID by entering the new hire information on the PSE300 screen in PMIS before hiring an employee in Cardinal. Localities that do not access PMIS need to contact the Office of Health Benefits to obtain an employee ID number. At this stage, localities should provision the employee ID number and continue with the hire the next day.

- Click the **Ok** button to close the pop-up window.

The **Search Criteria** page returns.

The screenshot shows the 'Search Criteria' page. A red box highlights the 'Add a Person' tab in the top left-hand corner. The page title is 'Search Criteria'. The search criteria are 'Person' for 'Search Type' and 'PSRS_HIRE' for 'Search Parameter'. There is an 'Ad Hoc Search' checkbox and a 'Prepare For Hire' button. The page is partially obscured by a torn paper effect at the bottom.

- Click the **Add a Person** tab in the top left-hand corner of the page.



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The **Add a Person** page returns.

10. Enter the **Employee ID** in the Person ID field.
11. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

12. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

13. Click the **Add Name** button.



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The **Name** page displays in a pop-up window.

14. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
15. Enter the employee's first name in the **First Name** field (required).
16. Enter the employee's middle name in the **Middle Name** field (optional).
17. Enter the employee's last name in the **Last Name** field (required).
18. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
19. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
20. Click the **OK** button.

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as required.

21. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
22. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
23. Complete the **Birth State** and **Birth Location** fields (optional).



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24. Scroll down to the **Biographical History** section.

The **Biographical History** section displays.

Biographical History

*Effective Date: 11/05/2020

*Gender: Unknown

*Highest Education Level: Not Indicated

*Marital Status: Unknown

Language Code:

Alternate ID:

☐ Full-Time Student

25. The **Gender** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal gender of the employee using the dropdown button.

26. The **Highest Education Level** field is a required field and defaults to “Not Indicated”. Select the employee’s highest level of education using the dropdown button.

27. The **Marital Status** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal marital status of the employee using the dropdown button to prevent errors from being reported on audit reports.

28. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.

29. Scroll down to the **National ID** section as needed.

The **National ID** section displays.

National ID

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number		<input checked="" type="checkbox"/>

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | **Contact Information** | Regional | Organizational Relationships | VA Person Info

30. Enter the employee’s SSN in the **National ID** field.



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Note: If the Employee ID and the Social Security Number are not the same combination that was entered into PMIS the day before, the transaction can't be completed.

31. Click the **Contact Information** link.

The **Contact Information** tab displays.

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Empl ID NEW

Current Addresses

Address Type	As Of Date	Status	Address
Home	11/05/2020	A	Add Address Detail

32. Click the **Add Address Detail** link.

The **Address History** page displays.

Address History

Address Type Home

Address History

*Effective Date 11/05/2020 Country USA *Status A

[Add Address](#)

OK Cancel Refresh

33. Click the **Add Address** link.



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The **Edit Address** page displays.

Edit Address

Country United States

Address 1

Address 2

Address 3

City State

Postal

County

OK Cancel

34. Enter the employee's complete address information using the applicable fields. **Address 1**, **City**, **State**, and **Postal** are all required fields. The others are optional.

35. Click the **OK** button.

The **Address History** page returns with the address information displayed.

Address History

Address Type Home

Address History | < > 1 of 1

*Effective Date	11/05/2020	Address	101 Main Street Richmond, VA 23234
Country	USA		
*Status	A		

[Add Address](#)

OK Cancel Refresh

36. Click the **OK** button.



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The **Contact Information** tab returns.

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Empl ID NEW

Current Addresses

Address Type	As Of Date	Status	Address			
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	Edit/View Address Detail	+	-

Phone Information

*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

37. Select the type of phone using the **Phone Type** field dropdown button.
38. Enter the applicable telephone number in the **Telephone** field.

Note: It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.
39. Select the **Preferred** checkbox option if applicable.
40. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+), and then repeating Steps 37 – 39.
41. Scroll down to the **Email Option Selection** and **Email Addresses** sections.



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The **Email Option Selection** and **Email Addresses** sections display.

The screenshot displays the 'Email Option Selection' and 'Email Addresses' sections of a web application. The 'Email Option Selection' section has three radio buttons: 'Agency Provided Email' (selected), 'Pending Agency Provided Email', and 'Employee Provided Email'. The 'Email Addresses' section is a table with columns: '*Email Type', '*Email Address', 'Preferred', and two empty columns. The first row is highlighted with a red border. Below the table is the 'Instant Message IDs' section, which includes a search bar, a table with columns: '*IM Protocol', '*IM Domain', '*Network ID', 'Preferred', and two empty columns. The first row is also highlighted with a red border. At the bottom, there are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A navigation bar at the very bottom shows links: 'Biographical Details', 'Contact Information', 'Regional' (highlighted with a red box), 'Organizational Relationships', and 'VA Person Info'.

*Email Type	*Email Address	Preferred		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

*IM Protocol	*IM Domain	*Network ID	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

42. Complete the **Email Option Selection** and **Email Addresses** sections based on the following guidelines. A valid email address is required for the employee to be notified when Benefit Confirmation Statements are ready for review.
- If the employee has been issued a business email:
 - Accept the default email option of “Agency Provided Email”
 - Select an email type of “Business” using the **Email Type** field drop-down button
 - Enter the applicable email address in the **Email Address** field
 - Select the **Preferred** checkbox option
 - If the employee’s business email has been requested but not yet assigned:
 - Select the “Pending Agency Provided Email” email option by clicking the corresponding radio button option
 - Select an email type of “Business” using the **Email Type** field drop-down button
 - Enter Noemail@virginia.gov
 - Select the **Preferred** checkbox option
 - If a business email will not be provided to the employee:
 - Select the “Employee Provided Email” email option by clicking the corresponding radio button option
 - Select an email type of “Personal” using the **Email Type** field drop-down button
 - Enter the applicable email address in the **Email Address** field



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iv. Select the **Preferred** checkbox option

43. Click the **Organizational Relationships** tab at the top of the page.

The **Organizational Relationships** tab displays.

Note: Localities do not utilize the Regional or VA Person Info tabs.

The screenshot shows a web application interface for managing organizational relationships. At the top, there are five tabs: "Biographical Details", "Contact Information", "Regional", "Organizational Relationships" (which is highlighted in green), and "VA Person Info". Below the tabs, the page displays "Person ID NEW". A section titled "Choose Org Relationship to Add" contains three checkboxes: "Employee", "Contingent Worker", and "Person of Interest". Below these checkboxes is a "Select Checklist Code" dropdown menu and a "Add Relationship" button. At the bottom of the form, there are several action buttons: "Save", "Notify", "Refresh", "Add", "Update/Display", "Include History", and "Correct History". A breadcrumb trail at the very bottom reads: "Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info".

44. Select the **Employee** checkbox option.

45. Click the **Add Relationship** button.



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The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.

The screenshot shows the 'Work Location' tab selected in the 'Job Record' page. The 'Effective Date' is set to 11/05/2020. The 'Action' is set to 'Hire' and the 'Reason' is set to 'New Hire'. The 'Job Indicator' is set to 'Primary Job'. The 'Position Number' field has a look up icon. The 'Regulatory Region' is set to 'USA' and the 'Company' is set to 'United States'. The 'Business Unit' is set to '15100' and the 'Department' is set to 'Department of Accounts'. The 'Date Created' is 11/05/2020.

46. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

47. The **Action** field defaults to "Hire"; no other selections are available.
48. Select "New Hire" in the **Reason** field using the dropdown button.
49. Select the applicable pooled position for the employee using the **Position Number Look Up** icon.



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The **Work Location** tab refreshes and auto-populates based off the selected Position Number.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Work Location Details ①

*Effective Date: 11/05/2020 Effective Sequence: 0 HR Status: Active Payroll Status: Active

*Action: Hire Reason: New Hire *Job Indicator: Primary Job

Go To Row + -

Calculate Status and Dates

Position Number: BCCHR002 Security Manager I: Current

Override Position Data

Position Entry Date: 11/05/2020 Position Management Record: ☐

Regulatory Region: USA United States Company: BCC Bland Correctional Center Business Unit: 71800 Bland Correctional Center Department: 100 BLAND CORRECTIONAL CENTER

Department Entry Date: 11/05/2020 Location: CENTR Dept of Corrections Establishment ID: DOC Dept of Corrections Date Created: 11/12/2020

50. Click the **Job Information** tab.

The **Job Information** tab displays.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Job Information Details ①

Effective Date: 11/05/2020 Effective Sequence: 0 HR Status: Active Payroll Status: Active

Action: Hire Reason: New Hire Job Indicator: Primary Job

Go To Row

Job Code: 96615 Security Manager I: Current

Entry Date: 11/05/2020 SOC Code: Supervisor Name: Test-Director of Corrections 00900018800 Billy Cryrus

Reports To: DOCHR001 Regular/Temporary: Regular Full/Part: Part-Time

Empl Class: Regular *Officer Code: None

Regular Shift: Not Applicable Shift Rate: Shift Factor:

Classified Ind: Unclassified

51. Review the information within the **Job Information Details** section.



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52. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
 - a. If the employee is assigned to a TLC position, select the “TLC EE” value.
 - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job. (i.e., **ONC**, **OTO**, etc.)
53. The **Officer Code** field defaults to “None”. Do not change.
54. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.

55. The **Payroll System** field defaults to “Payroll for North America”. Do not change.
56. The **Absence System** field defaults to “Other”. Do not change.
57. Select “MNP Non-Payroll” using the **Pay Group Look Up** icon.



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The **Payroll** tab refreshes automatically.

Work Location | Job Information | Job Labor | **Payroll** | **Salary Plan** | Compensation

Employee ID [redacted] Empl ID [redacted]
Employee [redacted] Empl Record 0

Payroll Information ?

Effective Date 11/05/2020
Effective Sequence 0
HR Status Active
Payroll Status Active
Action Hire
Reason New Hire
Job Indicator Primary Job

Go To Row

*Payroll System Payroll for North America
Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll
Employee Type S Salaried
Tax Location Code [redacted]
GL Pay Type
Combination Code

Holiday Schedule NOHOL LOCALITY
FICA Status Subject
[Edit ChartFields](#)

58. The **Employee Type** field defaults to “S” (Salaried). Do not change.
59. The **Holiday Schedule** field defaults to “NOHOL”. Do not change.
60. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
61. Click the **Salary Plan** tab.



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The **Salary Plan** tab displays.

Work Location | Job Information | Job Labor | Payroll | **Salary Plan** | **Compensation**

Employee ID: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Salary Plan Details ⓘ

Effective Date: 11/05/2020
Effective Sequence: 0
HR Status: Active
Payroll Status: Active
Action: Hire
Reason: New Hire
Job Indicator: Primary Job
Current ⓘ

Salary Admin Plan UG ↻ Ungraded
Grade ↻
Step
☐ Includes Wage Progression Rule

Grade Entry Date
Step Entry Date

Go To Row

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

OK Cancel Apply Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

62. Validate that the **Salary Admin Plan** field defaults to “UG” (Ungraded).

Note: If the **Salary Admin Plan** does not default to “UG,” then the wrong position number was used. Double-check the position number used on the **Work Location** tab before proceeding.

63. Click the **Compensation** tab.



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The **Compensation** tab displays.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

Compensation Details ?

Effective Date: 11/05/2020
Effective Sequence: 0
HR Status: Active
Payroll Status: Active
Action: Hire
Reason: New Hire
Job Indicator: Primary Job
Go To Row

Compensation Rate: 0.000000
*Frequency: A Annual

► **Comparative Information** ?
► **Pay Rates** ?

Default Pay Components

Pay Components ?

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

64. The **Frequency Code** field defaults to "A" (Annual). Do not change.
65. Click the **Default Pay Components** button.
66. Select "NAANNL" in the **Rate Code** field using the **Rate Code Look Up** icon within the **Pay Components** section.
67. Enter "0" in the **Comp Rate** field. (Payroll is not processed in Cardinal).
68. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected. Do not change.
69. Click the **Calculate Compensation** button.
70. Click the **Benefits Program Participation** link.



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The **Benefits Program Participation** page displays.

Benefit Program Participation

Employee Empl ID
Empl Record 0

Benefit Status ? Q | 1 of 1 ▶ ▶▶

Benefit Record Number 0 ↺

Effective Date 11/05/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

***Benefits System** Benefits Administration ▼

Annual Benefits Base Rate USD

Benefits Employee Status Active

Current ☐

[ACA Eligibility Details](#)

Benefits Administration Eligibility ?

BAS Group ID Q

Elig Fld 1 Q

Elig Fld 2 Q

Elig Fld 3 Q

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8 Q

Elig Fld 9 Q

Benefit Program Participation Details ? Q | 1 of 1 ▶ ▶▶ View All

***Effective Date** 11/05/2020 📅

Currency Code USD + -

***Benefit Program** PSX Q

Sys delivered empty Ben Pgm

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK **Cancel** **Apply**

71. Click the **Elig Fld 2 Look Up** icon. This value will be the department number for example: for position A310000P and/or A310000F the Elig Field 2 will be: 047039000 (the department number/DHRM group number).
72. Click the **Elig Fld 3 Look Up** icon and select “N” (No).
73. Click the **Elig Fld 8 Look Up** icon and select “12-12”.
74. Click the **Elig Fld 9 Look Up** icon and select the applicable benefits payment breakdown. These values represent the nature of the employee and how the employee’s health premiums are paid. Scroll through the bottom of the list to see the valid TLC available values.



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Note: For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

75. Click the **OK** button.

A **Warning** message displays in a pop-up window.

Warning -- Compensation Rate is zero. (1000,31)

Either the action is Hire or the Compensation Rate has been changed to zero.

If zero is correct, leave as is. Otherwise, enter a Compensation Rate.

OK **Cancel**

76. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.

Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID [redacted]

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

Empl Record 0

Select Checklist Code Hire

Add Relationship

Save Notify Refresh Add Update/Display Include History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)



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New Hire Benefit Enrollment

Now that the Locality HR Admin has completed the New Hire processing, the Locality BA will be able to complete the benefit enrollment elections for the new hire employee.

1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.

2. Click on the **Benefits Administrator** tile on the Cardinal Homepage.

The **Update Dependent/Beneficiary** page displays.



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3. Click the **Benefits Management** list item on the left-hand side of the screen.

The **Benefits Management** drop down menu displays.

The screenshot shows the 'Cardinal HR and Benefits' interface. On the left, a sidebar contains a dropdown menu for 'Benefits Management'. The 'On-Demand Event Maintenance' option is highlighted with a red box. The main content area is titled 'Update Dependent/Beneficiary' and contains a search form with various criteria and a 'Search' button.

4. Click the **On-Demand Event Maintenance** button.

The **On-Demand Event Maintenance** page displays.

The screenshot shows the 'On-Demand Event Maintenance' page. The 'Search' button is highlighted with a red box. The page contains a search form with various criteria and a 'Search' button.



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- Enter the **Empl ID** in the search box.
- Click the **Search** button.

The **On-Demand Event Maintenance** page displays with the employee's information.

Cardinal Homepage Benefits Administrator

On-Demand Event Maintenance

LIZZIE DOE Person ID Ben Record 0

Activity Date 10/13/2021 Source Job Data Change Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR

Event ID 0 Event Date Status Class Event Status Update

Prepare Options

Enrollment Statement Run Date

Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

Note: The Benefits Administration automated programming process prepares activities every two hours. If it has been more than two hours since the hire was entered, skip to step 11.

- Click on the **Show Activities** button.

The **Show Activities** page pop up displays.

LIZZIE DOE Person ID Ben Record 0

BAS Activity

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Job Data Change	10/13/2021	0	HIR	

OK Cancel

- Confirm that the job data change event for the HIR action is checked in the **BAS Activity** table.
- Click **OK**.



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The **On-Demand Event Maintenance** page returns.

Cardinal Homepage **Benefits Administrator**

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 10/13/2021 Source Job Data Change Empl Record 0

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 0 Event Date Status Class **Event Status Update**

Prepare Options Event Status

Enrollment Statement Run Date **Frequency**

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 0 **Show Plans**

Validate/Finalize Errors 0 **Show Errors** ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save **Return to Search** **Notify**

- Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity.

The **On-Demand Event Maintenance** page refreshes.

Cardinal Homepage **Benefits Administrator**

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 **Show Activities** Action

Event ID 1 Event Date 10/13/2021 Status Prepared Class HIR **Event Status Update**

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date **Frequency**

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 1 **Show Plans**

Validate/Finalize Errors 0 **Show Errors** ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N **Q** Normal Processing

Save **Return to Search** **Notify**

- Click the **Election Entry** button.



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The **Election Entry** page displays.

BenAdmin Data Entry

Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID [REDACTED] LIZZIE DOE Ben Record 0 Event ID 1
Event Data 10/13/2021 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code [REDACTED]

Health Provider ID [REDACTED] ☐ Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>

- Click on the magnifying glass next to **Option Code** under **Plan Type 10: Medical**.



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The **Medical Benefit Plan Elections Look Up** pop up displays.

Option Code	Option Type	Benefit Plan	Coverage Code
17	Option	176F05	1
18	Option	176F05	2
19	Option	176F05	3
20	Option	176F05	4
21	Option	176F06	1
22	Option	176F06	2
23	Option	176F06	3
24	Option	176F06	4
25	Option	176F07	1
26	Option	176F07	2
27	Option	176F07	3
28	Option	176F07	4
29	Option	176F08	1
30	Option	176F08	2
31	Option	176F08	3
32	Option	176F08	4

13. Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the employee. For this scenario, we will select a Benefit Plan with **Coverage Code 2**, for Employee + Spouse coverage.

Note: The coverage codes are: 1 – Single Coverage, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).



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The **Election Entry** page returns.

Note: If the employee selected single coverage, skip to step 32. If you need to add dependents, proceed with the following steps.

14. Click on the **Dependent/Beneficiaries** tab.

The **Dependent/Beneficiary** page displays.

15. Click on the **Change/Add Dependent Data** hyperlink.



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The **Dependent Information** page displays.

16. Click the **Edit Name** button.

The **Name** page pop up displays.

17. Enter the **First Name** and **Last Name** of the dependent as indicated by the employee in the New Hire Benefit Enrollment Form.

18. Click **OK**.



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The **Dependent Information** page returns.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The form displays the name 'LIZZIE DOE' and a 'Person ID'. Below this, there is a section for 'Dependent/Beneficiaries' with a search bar and navigation controls. A table lists one dependent with ID '01'. Below the table, there is a 'Name History' section with a search bar and navigation controls. It shows an entry with an effective date of '10/13/2021', a format type of 'English', and a display name of 'Billy Doe'. There are buttons for '+', '-', and 'Edit Name'. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons. The 'Address' tab is highlighted in the top navigation bar.

19. Click on the **Address** tab.

The **Address** page displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The form displays the name 'LIZZIE DOE' and a 'Person ID'. Below this, there is a section for 'Dependent/Beneficiaries' with a search bar and navigation controls. A table lists one dependent with ID '01' and name 'Billy Doe'. Below the table, there is an 'Address History' section with a search bar and navigation controls. It shows an entry with an effective date of '10/13/2021'. There is a checkbox labeled 'Same Address as Employee' which is currently unchecked. There is also an 'Address Type' dropdown menu. Below this, there is an 'Address' section with a 'Country' dropdown menu set to 'USA' and a search bar. There is an 'Edit Address' button. At the bottom, there is a 'Phone Information' section. The 'Address' tab is highlighted in the top navigation bar.

20. Check the box next to **Same Address as Employee**.



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21. Click on the **Personal Profile** tab.

The **Personal Profile** page displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Personal Profile' tab selected. The form displays information for 'LIZZIE DOE' (Person ID) and 'Billy Doe' (Dependent/Beneficiary ID 01). The 'Date of Birth' field is highlighted with a red box. The 'Personal History' section is also highlighted with a red box, showing dropdown menus for 'Relationship to Employee', 'Dependent Beneficiary Type', 'Gender', and 'Marital Status'. The 'Effective Date' is set to 10/13/2021. The 'Student' checkbox is unchecked.

22. Enter the **Date of Birth** for the dependent.

23. For this example, select **Spouse** from the drop-down menu next to **Relationship to Employee**.

Note: Localities should utilize the following **Relationship to Employee** types as needed: Child, Adult Child, Other Child, Spouse, US Same-Sex Spouse, Stepchild, Ex-Spouse. Other values are not accepted by benefits vendors.

24. The **Dependent Type** defaults to **Unapproved Dependent**. Select **Approved Dependent** from the drop-down menu next to **Dependent Beneficiary Type** only if all supporting documentation has been submitted by the employee.

Note: The dependents will not receive an insurance card until they are approved.

25. Select the **Gender** of the dependent.

26. Confirm the **Marital Status** is **Married** for the **Spouse** dependent.

Note: If any additional information was provided by the employee for the dependent, enter it on this page. The **Student** nor the **Smoker** checkboxes are utilized here.



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The **National ID** section displays.

*Relationship to Employee: Spouse

*Dependent Beneficiary Type: Approved Dependent

*Gender: Male

*Marital Status: Married

As of: 10/13/2021

☐ Student

☐ Disabled

☐ Smoker

Occupation:

USA

National ID

*Country	*National ID Type	Description	National ID	Primary ID		
USA	PR	Social Security Number		<input checked="" type="checkbox"/>	+	-

OK Cancel Apply

Name | Address | Personal Profile

27. Scroll down to **National ID** section and enter the **SSN** for the dependent.

Note: If the employee has not provided a dependent's SSN, the Locality BA can leave the field blank. However, when the SSN becomes available, the Employee or Locality BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, localities should make at least three attempts at obtaining the dependents SSN. Localities can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

28. Click **OK**.



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The **Election Entry** page returns.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window displays employee information for LIZZIE DOE, including Schedule ID EM00, Event ID 1, and Event Data 10/13/2021. It also shows a table of 'Dependent/Beneficiaries Currently on Record' with one entry: Doe, Billy, Spouse, Approved Dependent, Date of Birth 02/05/1993. Below this is a section for 'Elections Requiring Supplemental Information' with a table showing Plan Type 10: Medical and an 'Enroll Dependents' button. At the bottom are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe, Billy	Spouse	Approved Dependent	02/05/1993

Plan Type	Medical
10	Enroll Dependents

29. Click the **Option Election** tab.

The **Option Election** page returns.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window displays employee information for LIZZIE DOE, including Sched ID EM00, Empl ID, and Event ID 1. It also shows a section for 'Available Plans and Options' with a table for 'Plan Type 10: Medical' showing Option Code 18 and Key Adv 500 Comprehensive Dent (176F05) (Self + Spouse). Below this is a section for 'Dependents/Beneficiaries' with an 'Enroll All' button and a table for 'Dependents/Beneficiaries' with columns for ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. At the bottom are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
				<input type="checkbox"/>		<input type="checkbox"/>



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30. Click on the **Enroll All** button under the Dependent/Beneficiaries section to enroll all listed dependents in the Medical Benefit Plan for the employee.

The **Option Election** tab refreshes.

The screenshot shows the BenAdmin Data Entry interface. The 'Option Election' tab is active. The employee is LIZZIE DOE. The plan type is 'Plan Type 10: Medical'. The option code is 18. The health provider ID is empty. The 'Enroll All' button is highlighted in the 'Dependent/Beneficiaries' section. The table below shows the dependent Billy Doe, who is a spouse.

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Billy Doe	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>

31. For this example, confirm the **Spouse** is listed under the **Dependent/Beneficiaries** section for **Plan Type 10: Medical**.
32. Click **OK** to return to the On Demand Event Maintenance page.



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The **On-Demand Event Maintenance** page returns.

On-Demand Event Maintenance

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 10/13/2021 Status Entered Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

33. Confirm the **Status** is **Entered**, and the **Event Status** is **Open for Processing**.
34. Click on **Validate/Finalize** button to validate elections, close the event, and send the elections to the benefits vendors.
Note: Once the event has been finalized, you will receive a message indicating that the process has completed successfully.
35. Click **OK** on the pop-up window message.



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The **On-Demand Event Maintenance Page** refreshes.

The screenshot shows the 'On-Demand Event Maintenance' page for a user named LIZZIE DOE. The page is titled 'Benefits Administrator' and includes a sidebar with navigation options like 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Online Confirmation Statements', 'Review BAS Activity', 'On-Demand Event Maintenance', 'Update Event Status', and 'Benefits Configuration'. The main content area displays the event details for LIZZIE DOE, including 'Person ID', 'Ben Record', 'Activity Date', 'Source', 'Empl Record', and 'Pending Activities'. A table shows the event details: Event ID 1, Event Date 10/13/2021, Status Finalized - Enrolled, Class HIR, and Event Status Closed to Processing. The page also includes buttons for 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Event Status', 'Frequency', 'Deduction Frequency', 'Annual Frequency', 'Show Plans', 'Show Errors', 'Finalize/Apply Defaults', 'Reprocess', 'Process Indicator', 'Normal Processing', 'Save', 'Return to Search', and 'Notify'.

36. Confirm the **Status** is **Finalized – Enrolled** and the **Event Status** is **Closed to Processing**.